

Meritocratic Discourse: Research Framework

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Abstract

This paper presents a reflection on the process of doing critical meritocratic discourse research. Examples from a current project on the discursive construction of ‘meritocrat’ identity are used to illustrate how major challenges inherent in undertaking meritocratic discourse research can be addressed. These involved initial justifications of discourse theory as a research framework, research design and data collection in order to contribute to broader debates about age, gender and social status.

Keywords: meritocracy; merit, meritocratic discourse; meritocrat.

Introduction

The today’s discourse analysis may be characterized in terms of vivid formation not only as a new scientific paradigm, but also as the new domain of disciplinary methods and theories. The latter are now characterized both in terms of their theoretical fragmentation and on the other side in terms of escalation of discourse as a methodological basis for integrated research. The article goal is to contribute to a better understanding of the modern discourse theories which have the potential for solving some of the acute theoretical problems that emerge due to the specificity of such phenomena as the discursive and communicative turn in humanities, the information society and the status of the subject of social and cultural research. We believe that the conceptual category of meritocratic discourse provides the basis for development of effective new models of interdisciplinary research which become more important in the situation of development of internal negative processes in the present-day humanities and social sciences.

The research is intended to contribute to existing knowledge by investigating an under-researched topic in the discourse literature – ‘meritocrat’ identity and its implications in meritocratic discourse. Firstly, applying a variety of methods permits a greater understanding of the complexity of processes of social construction of ‘meritocrat’ identity and its implications for power relations between different groups in

a specific socio-economic context. Secondly, the sampling approach adopted leads to an exploration not only of the discursive processes of construction of ‘meritocrat’ identity, but also of its suppression in meritocratic discourse. Thirdly, the study illustrates the value of using discourse analysis to research the processes involved in the development of government policy which has implications for the amount of public recognition and government attention and assistance certain groups would receive.

1. Meritocracy and Merit: Notions

New Dictionary of Cultural Literacy (2005) defines meritocracy as “*a government or society in which citizens who display superior achievement are rewarded with positions of leadership. In a meritocracy, all citizens have the opportunity to be recognized and advanced in proportion to their abilities and accomplishments. The ideal of meritocracy has become controversial because of its association with the use of tests of intellectual ability, such as the Scholastic Aptitude Test, to regulate admissions to elite colleges and universities. Many contend that an individual's performance on these tests reflects his or her social class and family environment more than ability*”. The idea of meritocracy as a social system in which “merit or talent is the basis for sorting people into positions and distributing rewards” (Scully, 1997: 413) has received great attention since the term was popularized in 1958 by Young (1958).

In fact the term meritocracy by itself was coined by Michael Young in his critical social satire entitled ‘The rise of meritocracy’ (1958). Here, Young defines merit as an individual characteristic constituting of ‘intelligence and effort...(I + E = M)’ (Young 1958, p. 94). Young links the emergence of a society based on ‘the principle of selection by merit’ (Young 1958, p. 24) that replaced a society where status was ‘ascribed by birth’ (Young, 1958, p. 19) to changes in the British occupational structure.

Then a problem with ‘merit’ definition arises. McNamee and Miller (2004) think that an individual merit is generally viewed as a combination of factors including innate abilities, working hard, having the right attitude, and having high moral character and integrity. When factors associated with individual “merit” are related to income and wealth, it turns out that these factors are often not as uniquely individual or as influential as many presume. Most experts point out, for instance, that “intelligence,” as measured by IQ tests, is partially a reflection of inherent intellectual capacity and

partially a reflection of environmental influences. It is the combination of capacity and experience that determines “intelligence.” Even allowing for this “environmental” caveat, IQ scores only account for about 10% of the variance in income differences among individuals (McNamee and Miller, 2004; Fisher, 1996). Since wealth is less tied to achievement than income, the amount of influence of intelligence on wealth is much less. Other purportedly innate “talents” cannot be separated from experience, since any “talent” must be displayed to be recognized and labeled as such (Chambliss 1989). There is no way to determine for certain, for instance, how many potential world-class violinists there are in the general population but who have never once picked up a violin. Such “talents” do not spontaneously erupt but must be identified and cultivated.

According to McNamee and Miller (2004) applying talents is also necessary. Working hard is often seen in this context as part of the merit formula. Heads nod in acknowledgment whenever hard work is mentioned in conjunction with economic success. Rarely is this assumption questioned. Neither of these measures of “hard” work is directly associated with economic success. In fact, those who work the most hours and expend the most effort (at least physically) are often the most poorly paid in society. By contrast, the really big money in America comes not from working at all but from owning, which requires no expenditure of effort, either physical or mental. In short, working hard is not in and of itself directly related to the amount of income and wealth that individuals have.

Next story about attitudes here is mixed as well (McNamee and Miller, 2004). First, it is not clear which particular mix of attitudes, outlooks, or frames of mind are associated with economic success. The kind of mental outlook that would be an advantage in one field of endeavor, may be a disadvantage in another field of endeavor. A different set of “proper attitudes,” for instance, may be associated with being a successful artist than being a successful accountant. Second, the direction of influence is not always clear.

An example of the difficulty in discerning the impact and direction of these influences is reflected in the “culture of poverty” debate. According to the culture of poverty argument (McNamee and Miller, 2004), people are poor because of deviant or pathological values that are then passed on from one generation to the next, creating a

“vicious cycle of poverty.” According to this perspective, poor people are viewed as anti-work, anti-family, anti-school, and anti-success. That is, if you are desperately poor, you may be forced to be present oriented. If you do not know where your next meal is coming from, you essentially have no choice but to be focused on immediate needs first and foremost. By contrast, the rich and middle class can “afford” to be more future oriented since their immediate needs are secure. Similarly, the poor may report more modest ambitions than the affluent, not because they are unmotivated, but because of a realistic assessment of limited life chances. In this sense, observed differences in outlooks between the poor and the more affluent are more likely a reflection of fundamentally different life circumstances than fundamentally different attitudes or values.

Finally, McNamee and Miller (2004) challenge the idea that moral character and integrity are important contributors to economic success. Although “honesty may be the best policy” in terms of how one should conduct oneself in relations with others, there is little evidence that the economically successful are more honest than the less successful. The recent spate of alleged corporate ethics scandals at such corporations as Enron, WorldCom, Arthur Andersen, Adelphia, Bristol-Myers Squibb, Duke Energy, Global Crossing, Xerox as well as recent allegations of misconduct in the vast mutual funds industry reveal how corporate executives often enrich themselves through less than honest means. White-collar crime in the form of insider trading, embezzlement, tax fraud, insurance fraud and the like is hardly evidence of honesty and virtue in practice. And neither is the extensive and sometimes highly lucrative so-called “irregular” or “under the table” economy—much of it related to vice in the form of drug trafficking, gambling, pornography, loan sharking, or smuggling. Clearly, wealth alone is not a reflection of moral superiority.

Advocates of meritocracy stress that in true meritocratic systems everyone has an equal chance to advance and obtain rewards based on their individual merits and efforts, regardless of their gender, race, class, or other non-merit factors. In the United States, for example, survey research repeatedly reveals that Americans endorse the meritocratic ethos. Most believe that meritocracy is not only the way the system *should* work but

also the way the system *does* work (Kluegel and Smith, 1986; Ladd, 1994; Ladd and Bowman 1998).

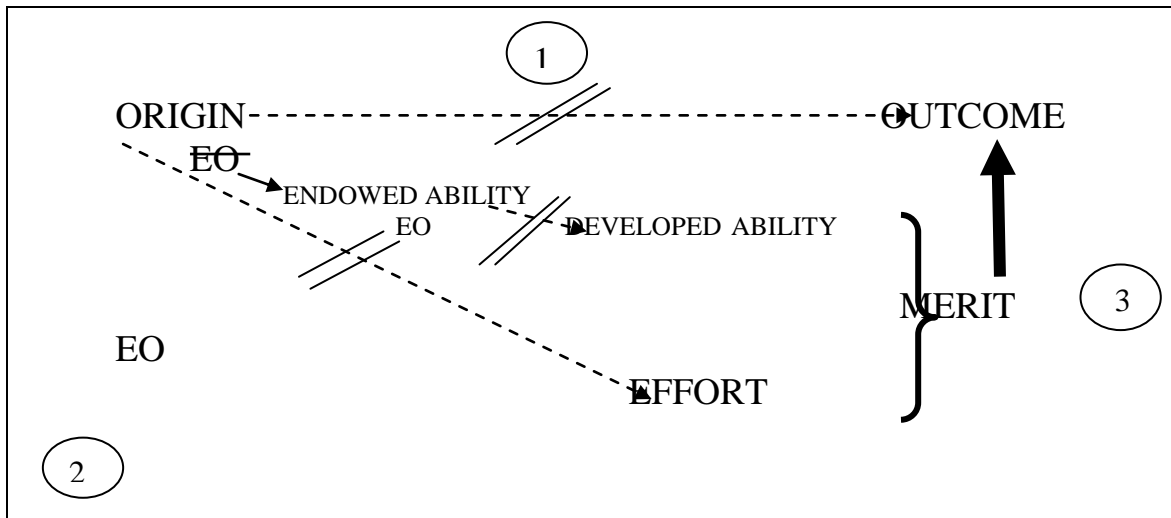
Because meritocracy has been culturally accepted as a fair and legitimate distributive principle in many advanced capitalist countries and organizations (Scully, 1997; McNamee and Miller, 2004), scholars have sought to assess the extent to which equal opportunity and meritocratic outcomes have been successfully achieved in society (Arrow, Bowles, and Durlauf, 2000; Dench, 2006).

Anna Zimdars (2007, p. 12) evaluates what meritocracy means in practice to select undergraduate students based on merit. Unfortunately, beyond the ultimately narrow consensus that we wish to live in a society where advancement depends on personal effort and ability, scholars, theorists and practioners disagree on how exactly to operationalise merit (Sen, 2000: 5, Arrow, 2000: ix, Schwartz, 2004: 2). One may even argue that meritocracy is ‘essentially contested’, that is, ‘the proper use of [the concepts] inevitably involves endless disputes about their proper uses on the part of their users’ (Freeden 2003). Schwartz’s comprehensive review of access to higher education illustrates the contested nature of the term merit in relation to making actual admissions decisions:

‘Everyone agrees that applicants should be chosen on merit: the problem arises when we try to define it. Merit could mean admitting applicants with the highest examination marks, or it could mean taking a wider view about each applicant’s achievements and potential’ (Steven Schwartz, 2004: 2)

On the one hand, Steven Schwartz seems to suggest that the ‘highest examination marks’ is one possible operationalisation of merit. On the other hand, the idea that a wider view (contextual factors) is needed leads to the contrasting implication; namely that examination marks alone are not an appropriate proxy of an applicant’s merit. Figure 1 is designed by Anna Zimdars (2007, p. 15) to aid the understanding of Schwartz’s observation by mapping the theoretical normative working of the meritocracy by showing the relationship between social origin, ability, effort, merit and outcomes.

Figure 1.1: The theoretical model of meritocracy



Key: **EO** Equal Opportunities required; \neq does not affect,

EO Equal Opportunities not given; 1,2,3 points of empirical study

The figure shows that in meritocracies, there is a legitimate link (3) between merit and outcomes. An example of an outcome would be labour market destination – the most rewarding or powerful employment positions, or both, should be awarded to the most meritorious individuals. Merit, however, should normatively not be influenced by social origin. When Schwartz states that wider considerations might be necessary to generate the outcome ‘university admission’ for applicants, he is saying that educational attainment as a proxy of merit contains measurement errors because there is in fact a link (2) between social origin characteristics and merit. This could mean that the same examination attainment achieved in different social or schooling contexts may actually be the result of different underlying levels of ability and effort. The same mark may therefore hide differences in latent ability or ‘potential’ because not everyone had the same opportunities to shine (Zimdars, 2007: 16).

This brings the discussion to the concept of equal opportunities and merit is viewed as a property relative to opportunities, which is a precondition for the smooth and uncontroversial working of meritocracy-based society. It means that ‘people with the same academic aptitude or ability should be given equal access to advantaged sectors of education’ (Heath, 2006: 3). Factors that might affect how an individual’s

efforts translate into achievement should be ‘regulated as to neutralize external influences’ (Habermas, 1976: 81). Nonetheless, there is a large body of empirical work that shows that actual chances to succeed in education are structured by social background factors (Breen and Goldthorpe, 1999).

2. Background: The ‘Meritocrat’ As an Object of Study

Over the last ten years research on meritocracy has undergone a dramatic expansion. Yet much of it presents meritocracy as essentially problematic, focusing either on the social problems of social outsiders or poor people as a social (and economic) burden (Arber & Ginn, 1991) on the rest of society which Butler (1989) argues is evidence of a new and disturbing ageism towards the socially unsecured (McNamee and Miller, 2004). According to the ideology of the American Dream, America is the land of limitless opportunity in which individuals can go as far as their own merit takes them. According to this ideology, you get out of the system what you put into it. Getting ahead is ostensibly based on individual merit, which is generally viewed as a combination of factors including innate abilities, working hard, having the right attitude, and having high moral character and integrity. Americans not only tend to think that is how the system should work, but most Americans also think that is how the system does work (Huber and Form 1973, Kluegel and Smith 1986). McNamee and Miller challenge in book “The Meritocracy Myth” (2004) the validity of these commonly held assertions, by arguing that there is a gap between how people think the system works and how the system actually does work. They refer to this gap as “the meritocracy myth,” or the myth that the system distributes resources—especially wealth and income—according to the merit of individuals. There are a variety of ways to depict America’s unequal distributions of income and wealth. Income refers to how much one earns and wealth refers to how much one owns. In general, the more wealth one has, the more likely that wealth derives from sources of ownership that tend to appreciate in value. Net worth refers to the difference between assets (what one owns) and liabilities (what one owes). Net worth is an accurate measure of what one is really “worth” (McNamee and Miller, 2004).

Such concerns have also stimulated interest in research on meritocrats and the labour market. Trends such as meritocrats’ social roles in the modern society have

heightened concerns about whether societies need them. The meritocrats are also recognized as increasingly heterogeneous with substantial differences in socio-economic status, employment patterns and stability, education, ethnicity and gender (Hayes, 2012). More fundamentally, the definition of 'who' is a 'meritocrat' is ambiguous and contingent. Meritocrats put all of their energy into working hard and getting the right answers to the questions at hand – and no energy into acquiring the power to implement those answers. Meritocrats are good corporate citizens but often end up being "eaten" by co-workers who are more politically savvy and power-oriented. Sometimes they haven't made the shift from the educational setting (where simply getting the right answer gets you the highest grade) to a world in which that right answer has to be "sold." These people aren't necessarily new to the business world – they may be in their 40s or 50s – but they're still operating under the assumptions that haven't worked since they left school (Husen, 1974; LaVaque-Manty, 2009). Meritocrats are usually less effective than they might be because they fail to persuade people of the value of their ideas. They may even pride themselves on their refusal to sully themselves by "playing politics." In the worst-case scenario, they're the people who are let go in a downsizing because they haven't developed and maintained a contact network that would help upper management see their value. They also have a more difficult time finding new work for the same reason. This is a very common and very dangerous problem (Kingston, 2006).

From a multi-disciplinary review of literature (economics, labour market research, sociology and cultural studies) some specific research questions were developed to study the construction of 'meritocrat' identity. They related to exploring the versions of 'meritocrat' identity that were being discursively constructed, identifying those who were being targeted by these constructions (du Gay 1996), identifying the social actors involved in this discursive construction of 'meritocrat' identity and exploring the reasons for their involvement, and examining the implications of such constructions of identity. Much of the existing research on meritocracy and meritocrats has focused on the content of age-based stereotypes, their cultural meaning and the outcomes or material effects of the marginalisation of meritocrats in the labour market. Yet no research had explicitly addressed the issue of the processes of identity

construction and this was the potential contribution of discourse theory: coupled with a critical orientation it would permit an exploration of the processes of constructing social identity and its political implications in relation to the labour market.

3. Discourse theory as a research framework

There are many definitions of discourse but it can be understood as referring to a group of statements which provide a language for talking about a topic and a way of producing a particular kind of knowledge about a topic. Thus the term refers both to the production of knowledge through language and representation and the way that knowledge is institutionalized, shaping social practices and setting new practices into play (du Gay 1996: 43).

While approaches to discourse analysis also differ widely, they share some common characteristics: the use of naturally occurring, unedited text or talk as data, attention to the significance and structuring effects of language, a focus on the local and global context of discourse, a focus on discourse as social practice, that is, how discourse users enact or resist social and political structures, an attention to the ways in which social members interpret, categorise and construct their social experience and the use of interpretive and reflexive styles of analysis. Beyond these general similarities, discourse research varies in its focus and approach, for example, between descriptive or critical studies (van Dijk 1997). Descriptive studies explore the discursive processes of social construction whereas critical studies focus explicitly on the reproduction of power relationships and how structures of inequality (Fairclough and Wodak 1997), such as class, race and gender, are reproduced in discourse (Fairclough 1995). In this context, social texts can be used as empirical data that ‘articulate complex arguments about race, class and gender in contemporary life’. It follows then, that struggles for power and control underlie the creation and dissemination of such texts (Phillips and Hardy 1997). Texts provide discursive cues to these power relationships and thus, through textual analysis, the power implications of the different constructions of social identity can be studied.

4. The construction of ‘meritocrat’ identity in meritocratic discourse

From the perspective of discourse analysis, identity is an ongoing process accomplished through social interaction, particularly language and communication. This is not to imply that people or objects do not have a physical or material existence but that the social meaning of this existence is discursively generated, rather than inherent and internal to the person or object itself (Burman and Parker 1993; du Gay 1996). Such constructivist view of social identity has implications for research design and methods: if social identities are seen as socially accomplished, then their relevance to social action can only be determined within the context in which they are accomplished (West and Fenstermaker 1995).

Meritocratic discourse constructs social identity of “meritocrat” (Hayes, 2012) by defining groups, group’s interests, their position within society and their relationship to other groups (van Dijk 1997). Social identity acts as an interpretive frame for social action (du Gay 1996) by indicating to people what they should think about a particular issue or group of people and in doing so, it functions as a mechanism through which collective group interests are played out in the social practices of individuals (van Dijk 1997). Language users engage in text and talk not just as individuals but also as members of multiple social categories and they construct or accomplish and display these social identities in discourse (van Dijk 1997). However such constructions are never fixed or stable as they are the outcome of a complex and contradictory interplay of discourses. Thus social identity may be fragmented, ambiguous and subject to continuous reproduction through political, social and discursive processes (Hardy, 1999).

Critical discourse analysis has been used to study social identity because ‘meritocrat’ identity reproduces and sustains power relationships between different social groups. Through discursive strategies of group definition and differentiation, ‘meritocrat’ identity is constructed through position and relation to other groups. Meritocratic discourse like any discourse is always connected with one’s own identity, that is to say, with the question ‘how do we see ourselves?’ The construction of identity is a process of differentiation, a description of one’s own group and simultaneously a separation from the ‘others’ (Wodak 1996: 126).

While ‘meritocrat’ identity has been rarely examined (Kingston, 2006; Hayes, 2012), the construction of gender and racial identity has been the subject of critical discourse research broadly referred to as ‘discourses of difference’ (Wodak 1996). For example, gender studies research has explored how language use and behaviour constructs, reproduces and resists masculine and feminine identities, gender prejudice and gender-based inequalities in employment (Mumby and Clair 1997).

Thus the current research project attempts to extend this existing ‘discourses of difference’ tradition to research another body-based system of social categorization – ‘meritocrat’ identity. The discursive construction of social ‘meritocrat’ identity occurs through the complex interaction and convergence of various discursive moves, resources, and strategies. In recognition of this complexity, the research design for this project has deliberately attempted to apply a range of discourse analytic methods to the object of study, notwithstanding the widely acknowledged labour-intensive nature of data analysis (Burman and Parker, 1993).

There is also a range of initial findings illustrating the relational nature of ‘meritocrat’ identity. ‘Meritocrat’ identity is planned to be constructed in relation to a number of other groups including other social actors in the labour market institutional domain and other ‘disadvantaged groups’ in the labour market. These findings have confirmed the complexity of the processes of social construction as well as the need to consider multiple, overlapping social identities in research on ‘meritocrat’ identity.

In the pilot study, it was found that social actors such as ‘labour market service providers’ constructed versions of ‘meritocrat’ identity consistent with a favourable version of their own ‘identity’ and role within the labour market system and the meaning of labour market reforms. Critical linguistics was used to connect the use of a ‘meritocracy discourse’ and distinct lexical patterns to support these versions of identity (‘meritocrats’ as ‘executives’ or ‘co-workers’). This finding illustrates how close textual analysis enriches an understanding of the processes by which broader institutional structures and systems are maintained (Kingston, 2006).

The assertion that social identities are constructed implies that the meanings of ‘meritocrat’ identities are not a given but are contingent on history and context. Kingston (Kingston, 2006: 118) offered the example of “the very bright hardworking

executive who alienates co-workers because of repeated failure to acknowledge others' contributions" of the twentieth century, who would today be constructed as "meritocrats." Contextual influences may also shift the meaning of meritocratic identity for individuals. For example, the experience of being an outstanding test taker at school who is consistently rewarded for getting the highest score or later the equities analyst at a bank but having a naive reliance on the authority of objective, measurable facts, never accepting that in the real world, ideas have to be sold, negotiated, and shaped to meet political and organizational realities. This type of a person can seethe when people challenge his analysis of a company or ignore his recommendations, especially when they act only on their gut feel for the market. Likewise, when less bright but more politically savvy peers are promoted ahead of him, the person can be infuriated and his meritocratic behavior might sabotage the career.

Finally, to assert that social identities are enacted is to recognize that one creates identification through verbal performance and in negotiation with one's interactants. Thus, one may emphasize one aspect of identity (e.g., gender) in one context and emphasize another aspect (e.g., ethnicity) in another context. In fact, as much of the literature on language code shifting reveals, one may emphasize or de-emphasize various aspects of identity even within the course of one conversation (Blom & Gumperz, 1972).

Conclusions

Discourse analysis has some inherent challenges but the current study has shown that these are not insurmountable, although the strategies adopted will vary according to the particular characteristics of the research site, textual data and research questions. Consistent with the broader tradition of discourse analysis, the current study tries to adopt reflexive and interpretive styles of analysis (Burman and Parker 1993) while attempting to systematically manage the collection and analysis of textual data. The paper also reviews a range of studies concerned with social ('meritocrat') identity in meritocratic discourse. This study illustrates the potential of discourse research to contribute to broader debates about political struggles for recognition, unemployment and other current issues of socioeconomic and political importance such as concern over ageing populations and the distribution of work. More specifically it highlights the

connections between the discursive construction of social identity, the processes of policy development and their potential affects on outcomes for different groups, connections which have yet to be fully explored in discourse research. Following on pioneering works in this area, social ('meritocrat') identity analysts have shown that written discourse serves as a vehicle for expressing and constructing many facets of social identity, no less than does speech, it may contain linguistic markers by which writers convey ethnic, role, and gender identity. Many studies of variation in written language are consistent with this contemporary notion of social identity.

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